

## **Position Information – Contact Representative (Service Representative),** **GS-0962-4/5/6/7**

At the full performance level, the incumbent would be expected to provide a full range of assistance to beneficiaries and inquirers in person, by telephone or by correspondence regarding all programs administered by the Social Security Administration. ***If hired below the full performance level, the incumbent will perform in a trainee capacity, with assignments leading to being able to perform the full range of duties described below.***

### **Duties:**

- Interviews beneficiaries, inquirers or their representatives to determine the nature of their problem or interest. Explains technical provisions, elicits relevant facts and resolves problems with payments or eligibility. Provides beneficiaries with information, advice or instructions about eligibility and benefits being paid under retirement, survivors, disability and Medicare insurance programs; the Black Lung program and Supplemental Security Income. Also furnishes information to inquirers about work incentive provisions, compliance with the various beneficiary reporting requirements and submitting appropriate reports to continue, suspend or terminate monthly payments.
- Completes SSI abbreviated applications, making determination of ineligibility to SSI benefits when reason for denial is clear. Considers all nonmedical eligibility requirements including all possible exclusions to income and resources before denying claims. Documents reason for denials and inputs systems record creating denial notices and protecting claimants' appeal rights.
- Identifies persons requiring representative payees in most post-entitlement situations. Evaluates the qualifications of prospective candidates, assesses capability, selects the preferred payee, and at specified intervals, reassesses the continuing suitability of current payees.
- Develops, documents and resolves Title XVI overpayments. Determines amount of excess payment and resolves overpayment by recovery, waiver and/or determination that the overpayment did not exist or is uncollectible. Documents SSI file and issues appropriate notices.
- Receives requests for waiver of overpayment in Title XVI cases. Completes Request for Waiver and Recovery Questionnaires. Verifies allegations as necessary. Determines if individuals are without fault in causing overpayments and if other waiver provisions are met. Documents decisions and generates notices of decision and appeal rights.
- Investigates case situations and reconciles discrepancies causing interruption in the receipt of monthly benefits. Decides when critical payment system (CPS) and/or immediate payment (IP) procedures should be used in sensitive or dire need situations. Completes documentation and makes payment authorization. Checks for outstanding overpayment, withholding (SMI), computing any underpayment due, determining payment amount and posting the system.
- Investigates case situations and reconciles discrepancies causing interruption in receipt of monthly benefits or Medicare payments; pursues to completion incidents of dissatisfaction with Medicare reimbursement rates or other practices which are remedial through administrative processes.
- Provides information and advice about specific retirement options and computes estimated monthly benefits payable at various ages to enable individuals to make retirement decisions that will affect them the rest of their lives.
- Answers questions and resolves problems concerning Medicare payment. Pursues to completion incidents of dissatisfaction with Medicare reimbursement rates or other practices. Provides assistance in the preparation of Medicare claims and appeal forms. Explains and processes requests about state buy-in rules and initiates action with State agencies to enroll individuals. Explains options about initial enrollment periods (IEP), general enrollment periods (GEP) and special enrollment periods (SEP) and provides complete information that will allow individuals to decide the most advantageous month to enroll. Takes and processes enrollment applications, and, if necessary, secures evidence for entitlement to an SEP. Makes equitable relief and good cause recommendations concerning the month of enrollment and premium surcharges.
- Processes even the most complex Social Security Number applications. Codes, evaluates evidence per legislative requirements and checks documents for authenticity.
- Initiates contacts with beneficiaries or others to obtain omitted reports and clarify inconsistent or incomplete reports. Investigates and resolves systems-identified discrepancies and questionable situations. Makes routine as well as complex systems inputs to correct or change records of entitlement and eligibility.

- Identifies need for social services of people interviewed and refers them to appropriate private, nonprofit or government organizations supplying such services. Handles Medicaid eligibility questions, including resolution and referral, as appropriate.
- Identifies situations with public affairs implications or problems and issues of such complexity or magnitude to warrant referral and refers them to superiors or other organizational components.
- As assigned, participates in training sessions as an instructor.
- May perform cashier duties through the use of the Third Party Draft System for the payment of certain administrative expenses (such as claims evidence, local travel, small purchases, etc.). Maintains accurate receipts and controls to account for all draft activity and is responsible for safeguarding drafts. Ensures the drafts are issued for authorized purposes. Inputs payment information into the Agency's central accounting system via PC Email.

#### **Complexity:**

- Assignments require the employee to perform complex, varied, nonstandard tasks requiring application of laws, regulations, policies and procedure and to use a complex body of specialized subject matter knowledge. Good interviewing or correspondence techniques are required to secure accurate information in a courteous, efficient manner. Incumbent must explain various alternatives open to the claimant and advise on the most appropriate course of action. Assignments involve making decisions on a variety of post-entitlement matters often involving sensitive situations.

#### **Responsibility:**

- The work performed directly impacts on the entitlement rights and monthly payments of members of the public and beneficiaries who may be totally dependent on the receipt or continued receipt of benefits. The work performed can result in the selection of an improper payee or improper denial of SSI benefits, the incorrect waiver of an overpayment or a penalty payment. Errors in work can cause improper interruption or termination of monthly payments to the severe inconvenience of a beneficiary, incorrect payment or payment of incorrect amounts of continuing monthly benefits for periods of 5, 10 or more years, and can cause delay in resumption or termination of benefits or delay in reimbursement for beneficiary outlays for medical treatment.

#### **Personal Contacts:**

- Contacts are with beneficiaries, the general public, workers in the office, social agencies and other public assistance agencies outside of SSA in person, by telephone and by correspondence. Contacts are to explain and interpret laws, regulations, policies and procedures applicable to the individuals' situation. Persons contacted may be uncooperative, irate or confused requiring the employee to use tact and diplomacy to persuade and motivate the individual to achieve the desired results.

#### **Physical Demands & Work Environment:**

- The work is primarily sedentary and is performed in an office setting with no unusual environmental stress.